

Approving an eRequisition

The approval process allows the appropriate personnel to approve, edit, or deny items that have been requested. Each eRequisition must be fully approved within the NC E-Procurement Service before the purchase order is generated and sent to the supplier. The approval flow for each user may differ based on the user's management level and supervisor. For more information on how approval flows are generated, please refer to the Security Administration – User Maintenance Process Guide.

Approvers may set their E-Procurement e-mail preferences to receive an e-mail notification each time an eRequisition is sent to them for approval. This e-mail serves as a notification only. The requests will appear in the Approval Requests folder even if the approver elects not to receive the notification.

The screenshot shows the NC E-Procurement web application interface. On the left sidebar, under the 'To Do' section, there is a link for 'Approve Requests' with a count of 42. Below it, 'Watch Requests' has a count of 0. The 'Status' section shows 'Composing' (10), 'Submitted' (0), 'Approved' (1), and 'Denied' (0). The 'Create' section has links for 'eRequisition', 'eForm', and 'Travel & Expense'. The 'Explore' section has links for 'System Searches', 'Catalogs', 'Folders', and 'Administrator'. The 'Report' section has a link for 'Standard Reports'. The 'Receive' section has a link for 'Purchase Orders'. In the center, there is a 'Swoosh' diagram with nodes for 'Approve', 'Receive', 'Explore', and 'Create'. A yellow callout box points to the 'Approve' node and the 'Approve Requests' link, stating: 'Approvers can access the list of eRequisitions awaiting approval in two ways: 1) 'Approve Requests' link in the Shortcut Menu or 2) 'Approve' button on the Swoosh.'

1. Click the '**Approve Requests**' link from the Shortcut Menu.

Note: The Shortcut Menu will display the number of eRequisitions awaiting approval as well as the number of eRequisitions sent to the approver as Watch Requests. Watch requests are sent to the approver to view, but do not require their approval.

Approve Requests

You are included in the approval flow for these requests. Taking action, click the request's ID or title.

You have 15 requests awaiting your approval.

Type	ID	Date Submitted	Requestor	Status	Title	Total
<input type="checkbox"/>	PR82A279	Today, 2:32 PM	CORR Requestor 01	Submitted	Approve Requisition	\$19.95USD
<input type="checkbox"/>	PR82A211	Thu, 15 Sep, 2005	CORR Requestor 01	Submitted	Cancel Test	\$10.00USD
<input type="checkbox"/>	PR82A181	Wed, 14 Sep, 2005	CORR Requestor 01	Submitted	test of the sql failure	\$0.00USD
<input type="checkbox"/>	PR82A104	Fri, 9 Sep, 2005	CORR Requestor 01	Submitted	Untitled eRequisition	\$0.00USD
<input type="checkbox"/>	PRTEST1000127	Mon, 29 Aug, 2005	CORR Requestor 01	Pending	Test of the payment basis	\$0.00USD

At the bottom of the list, there are buttons for **Approve** and **Deny**, and a 'Move to Folder' dropdown menu currently set to 'Archive Items' with a **Move** button.

- Review the eRequisition to be approved by clicking the **'Title'** of the eRequisition or the eRequisition **'ID'**.

Note: Users may approve the eRequisition(s) without reviewing the details by placing a checkmark in the checkbox beside the appropriate eRequisition and clicking the **'Approve'** button at the bottom of the list.

Note: To approve multiple eRequisitions at once, place a checkmark in the checkbox beside each eRequisition, and click the **'Approve'** button.

Approval Summary

Review the request and then approve, deny, or cancel the request from the pull-down list, or click an action link.

CORR Requestor 01 : \$10.00USD
 PR82A211 : Cancel Test

[Hide Details](#)

[How To](#)

Request: PR82A211 of 11

[Approve](#) [Deny](#)

No.	Type	Description	Qty	Unit	Price	Tax	Other	Amount
1		Enter a description for this item.				00USD	\$0.00USD	\$10.00USD

HUB
 Contract ID:
 Supplier: [JCN Technologies](#)
 Location: [JCN Location 3](#)
 Company: 4201
 Account: 4201533190
 Center: 4201131012005

Approval Flow

Legend: ☐ Pending ☒ Active ☒ Approved ☒ Denied ☒ Watcher

PR82A211 — ☒ CORR Approver 11 — ☒ CORR Purchasing Agent — ☐ Approved

3. Review details and click the **'Approve'** button.

Note: Approvers can now view the entire approval flow of the eRequisition as well as add comments directly on this page.

Approve - Comments

Enter a comment; other approvers and users will see your comments. To move approved items out of your To Do list, archive the document to the default Archive Items folder or select another folder. See the online help for information about the partition to which the document can be archived. [How To](#)

You chose to approve PR82A279.

Comments:

Selecting the checkbox will send comments to your integrated backend system and place them on the purchase order.

☐ include comment and/or attachments on purchase orders

☒ Archive item(s) to folder: Archive Items

Be sure to check the box to include the comment and/or attachment(s) on the purchase order, if necessary.

4. Add comments and/or attachments and click '**OK.**'

Note: eRequisitions are automatically moved to the Archive folder after being approved unless another folder is selected. Use the dropdown box beside 'Archive item(s) to folder:' to choose the appropriate folder.

Note for NCAS users: Once all required approvers have approved the eRequisition, the eRequisition will become a purchase order and is automatically sent to the supplier. The status of the purchase order will be '**Ordered.**'

Note for LEA and Community College users: Once all required approvers have approved the eRequisition, the eRequisition is then sent to the appropriate financial system (e.g., Sunpac, ISIS, or Colleague) for further processing. The status of the eRequisition will be '**Approved**' and will **not** change.